

For Reference Only - Do not use to submit a claim

STATEMENT OF EXPENSE FOR MONTANA LEGISLATORS

Meeting Description: _____

Meeting Date: _____

Meeting Location: _____

--COMPLETE THIS COLUMN ONLY--

SALARY:

Number of days claimed _____

EXPENSES:

MEALS (insert number of meals claimed)

Breakfast _____

Lunch _____

Dinner _____

LODGING (insert number of nights claimed)

Most locations - \$91.00/day plus applicable taxes

Helena - \$95.00/day plus applicable taxes

(Receipt required) _____

\$12.00/day non-receiptable facility _____

MILEAGE (insert number of miles claimed)

Round trip miles, \$.535/mile _____

AIR TRANSPORTATION

Commercial (Receipt required) _____

Private plane \$1.12/nautical mile _____

MISCELLANEOUS (Registrations/Taxi)

(Receipt required if \$25 or more) _____

I CERTIFY THAT I AM ENTITLED TO REIMBURSEMENT BY THE STATE OF MONTANA FOR THE EXPENSES CLAIMED IN ACCORDANCE WITH THE STATUTES AND RULES LISTED ON THE REVERSE SIDE OF THIS FORM.

Circle One:

Senator / Representative / Public Member

Printed Name: _____

Signature (use ink): _____

Address: _____

--DO NOT WRITE IN THESE COLUMNS--

x \$90.64 = _____

IN-STATE	OUT-OF-STATE
5.00 _____	11.00 _____
6.00 _____	12.00 _____
12.00 _____	23.00 _____
\$ _____	\$ _____
62407/62410	62417/62430
\$ _____	\$ _____
62406/62408	62416/62418
\$ _____	\$ _____
62401	62411
\$ _____	\$ _____
62402	62412
\$ _____	\$ _____
62405/62809	62415/62809

Expense Total: _____

Voucher Number: _____

Org #: _____

Total Claim: _____

Approval: _____

SPACES LEFT BLANK WILL NOT BE REIMBURSED. ATTACH REQUIRED RECEIPTS.

TIMELY SUBMISSION OF CLAIMS: Under state policy, you must submit a request for reimbursement of travel costs within 3 months of incurring the expense or you waive the right to reimbursement.

OTHER INFORMATION: A copy of this claim will be returned to you for your tax records. You may be eligible for income tax deductions for expenses not reimbursed by the state. Information on this claim is subject to public disclosure.

"5-2-302. Compensation and expenses when legislature not in session. When the legislature is not in session, a member of the legislature, while engaged in legislative business with prior authorization of the appropriate funding authority, is entitled to:

- (1) a mileage allowance as provided in 2-18-503;
- (2) expenses as provided in 2-18-501 and 2-18-502; and
- (3) a salary equal to one full day's pay at the rate of a classified state employee, described in 5-2-301(1) for each 24-hour period of time (from midnight to midnight), or portion thereof, spent away from home on authorized legislative business. However, if time spent for business other than authorized legislative business results in lengthening a legislator's stay away from home into an additional 24-hour period, he may not be compensated for the additional day."

Summary of Statutes Governing Travel Reimbursement

Section **2-18-501** governs the reimbursement to persons in state service for the cost of meals, lodging and transportation. It establishes the limits listed on the front of the form and authorizes reimbursement of reasonable transportation costs and other necessary business expenses subject to proper documentation. All commercial air travel must be by the least expensive class service available. Tips are not reimbursable expenses.

Section **2-18-502** governs computation of meal allowance. Meal reimbursements are limited to the amounts shown on the form. A legislator attending an interim meeting is entitled to a midday meal allowance for that day regardless of the proximity of the meeting to home. Otherwise, members should be in a travel status to claim meals.

Section **2-18-503** governs the mileage allowance. Reimbursement is made for miles traveled in the performance of official duties. The rate is based on the current mileage allotment, as allowed by the IRS, for the first 1,000 miles and 3 cents per mile less for all miles thereafter traveled within a given calendar month. Members who use their own airplanes in the performance of official duties are entitled to collect mileage only for the nautical air miles actually traveled, at a rate of twice the mileage allotment for automobile travel.

The statutes discussed above authorize the Department of Administration to adopt rules governing travel expenses. Those rules are found in Title 2, Chapter 4, Sub-Chapter 1, Administrative Rules of Montana. Travel policy is found in the Montana Operations Manuals, Volume 1, Chapter 0300.

Travel authorizations and claims may be reviewed by appropriate legislative leaders and committee chairmen.

Guidelines for Evaluating Reasonableness of Claims Adopted by the Legislative Council

The following guidelines are used to determine if time spent away from home reasonably falls within the context of authorized legislative business:

1. Overnight lodging is reasonable when the member would be required to leave home earlier than 6:30 a.m. or arrive home later than 6:30 p.m. in order to have attended all of the meeting or have conducted all of the authorized legislative business. To compute whether this would be required, an average travel speed (overall, including incidental stops) of 50 miles an hour is used. The one-half hour immediately preceding and immediately following a meeting or activity is an in-town travel shift and considered to be part of the total meeting schedule for the purposes of the reasonableness computation.
2. A legislator is entitled to a day's salary when necessarily away from home for authorized legislative business. A member is considered necessarily away from home on the day of a meeting or other authorized legislative activity and on any other day when travel qualified under #1 above is required.
3. Subject to statute, a meal falling within reasonable travel times may be claimed.

Special circumstances are considered in determining reasonableness. Such circumstances may include inclement weather, a legislator's health, variables related to flying instead of driving, and schedule conflicts which require a member to choose a more expensive mode of travel in order to participate in the legislative activity. Special circumstances should be clearly presented on the claim form.